

M3 Report Writer

The report writer can be used for most of your reporting needs, including employee and personnel listings. You also can access current, MTD, QTD, and YTD values for any earning, deduction or tax code. Various formatting options are provided to facilitate the creation of a variety of output files.

Creating a simple report

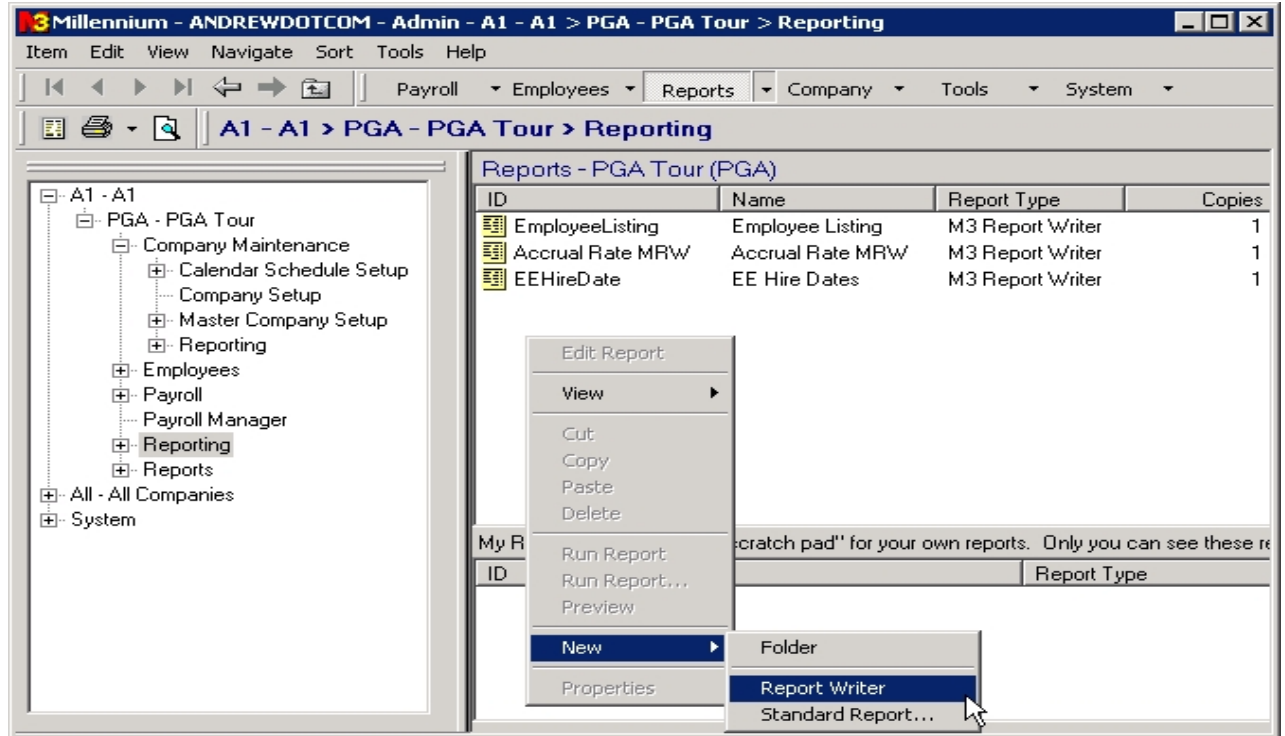
Reporting data is a key to being able to satisfy customer needs. As a means of reporting, there are two options to use. Option 1 is to create a report in a reporting utility such as Crystal Reports, and Option 2 is to create a Millennium Report Writer Report. Option 2 is what we are working with in this article as often times the case is that you need to produce a quick report without getting into all the details of using Crystal. Or often the case, we are all not skilled in the knowledge of writing reports in Crystal.

To create a Millennium Report Writer report, you can do this in multiple places within the software. The options are (all are based on the Tree):

- Company > Reporting
- Company Maintenance > Reporting
- System > Reporting

Note : when creating Report Writers at the system level, you cannot access certain information that is available in the company level.

Step 1 : Creating the Report



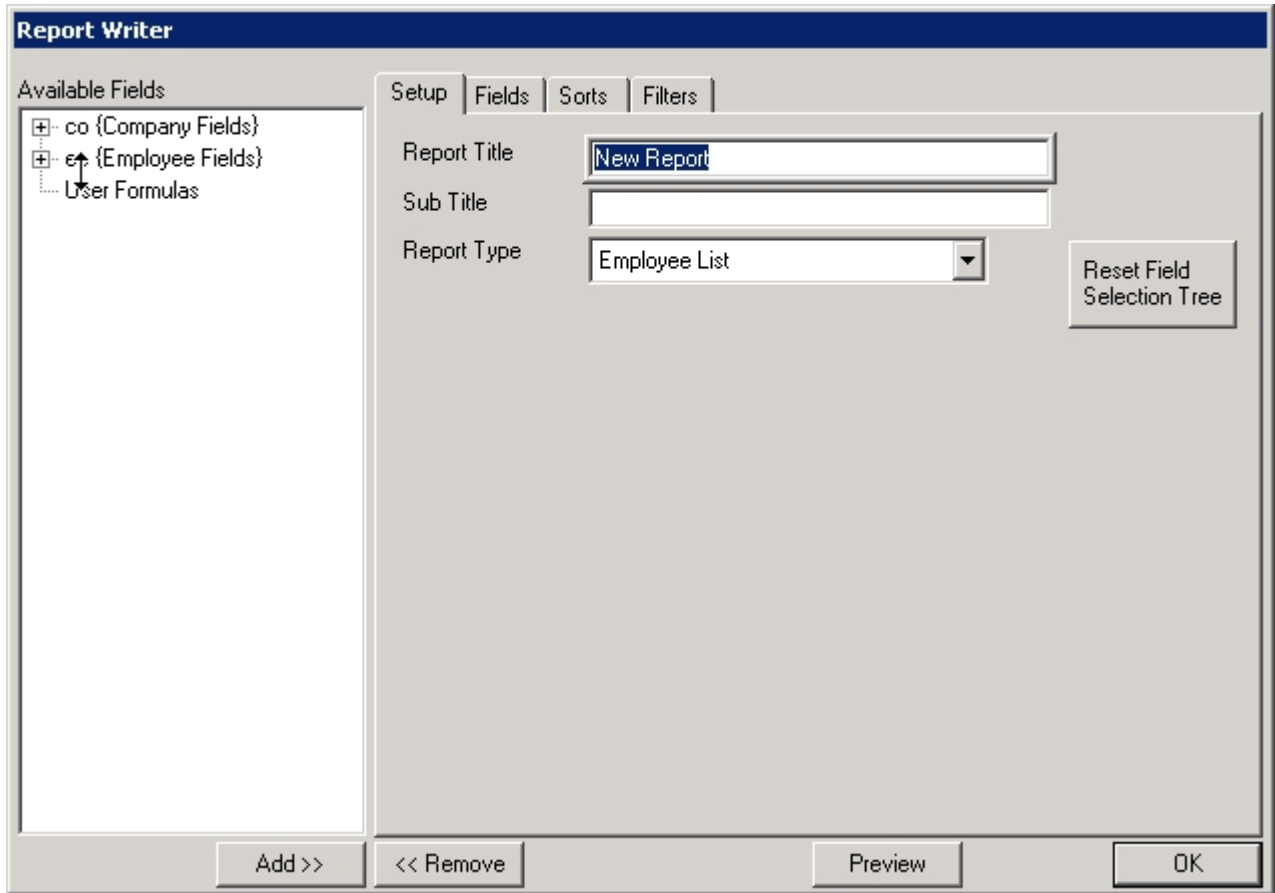
Navigate to the section of Millennium where you want to create the report. For example purpose I am in the Company > Reporting section. Above you will see a screen shot of how to add a new Report Writer. Right click on the window to select New, which opens up a little sub menu to select Folder, Report Writer, or Standard Report. Select Report Writer.

Step 2 : Naming the Report

When the report is added to the screen the Default ID and name are both "New Report", it is a good idea to give your report an ID and a name. First do the ID, select a short one word description to call your report. Save the longer description for the name/title of the report. To set the id, you should just click once on the ID and it should allow you to rename the item, just as if you were renaming a file within windows.

Editing The Report

Now that the report has an ID, right click on the ID just as you had to do to create the report, and select Edit Report. Edit Report will allow you to make the report and define the information. If Edit Report is grayed out, you are not selecting a Millennium Report Writer. When you select Edit Report you will see the following window.



The window shown above is the same for new reports and editing existing reports. The Edit Report Writer window has four parts to it.

- **Setup** - Basic Information that describes the **Title**, **Sub Title**, and **Report Type**.
- **Fields** - Specifies the fields and headings that appear in the report. This section is the content of the report.
- **Sorts** - Specifies how the report is sorted. **This section is optional.**
- **Filters** - Specifies any filtering done in the report. **This section is optional.**

Now that we are familiar with the basic sections of the report we can discuss each section and the implications it has on the report.

Step 3 : Setting up the Report

The setup tab as mentioned and shown above contains three fields. The Title is just the heading of the report and sub title is a sub heading. The Sub Title is an optional field. The Title is also the Name that will appear in the Reporting Section. The important field is the Report Type. The report type is used to tell the system what to display as the detail items on your report. For example, if you choose a report type of "Employee List" Millennium will display one line per employee.

If you choose a report type of "Employee Paychecks", one line per check will be displayed. When you have finished setting up the setup information, you can chose the Fields tab.

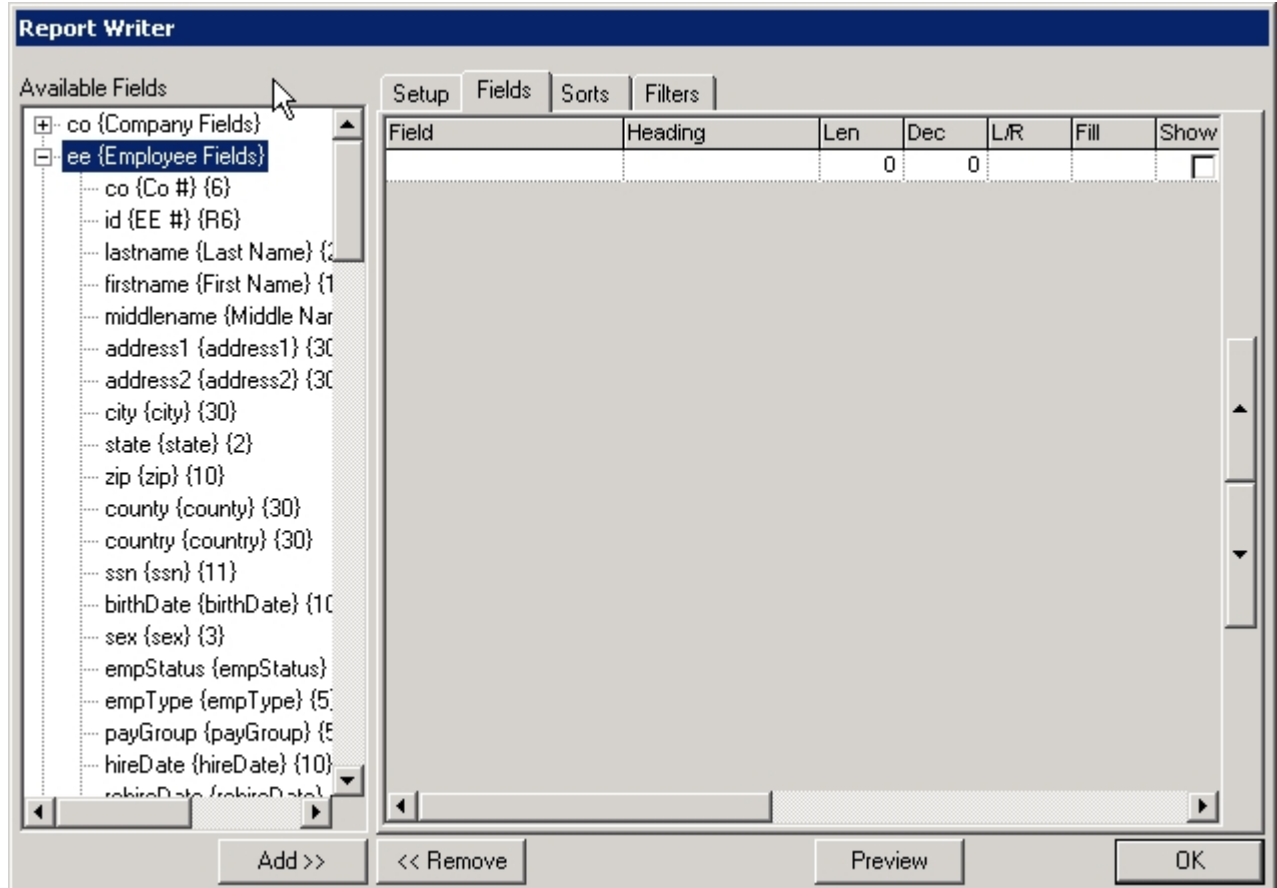
If you decided to change the Report Type, you will need to press the reset field selection button. This will refresh the tree view to include the newly select Report Type. Employee Listing is the default and is available to be used on any of the Employee Report Types. If you decide to use a company level report type, the Employee Listing is not available. One thing to note at this time as of M3 Version 3.6.5 you are restricted to using only one report type at a time. Meaning you cannot create your report in one type, then change the report and add info from that new type. Only the selected Report type will appear in the data.

General Notes

Additional Functions (Can be used from any tab in the Report Writer)

- **Add:** Adds the highlighted field to the tab in use.
- **Remove:** Removes the highlighted field from the tab in use.
- **Preview:** Allows you to quickly print preview the report.

Step 4 : Entering the Needed Fields for the Report



The Fields tab as noted before will allow you to decide what information goes into the report. The allowable information that you are able to put into the report is decided by the Report Type you have selected on the Setup Tab. If after doing some work you decide that you want to change the data in the report there is no need to delete the report and start over, you can simply change the Report Type on the setup tab and press Reset Selection Tree. There are two designations of the information you see on this tab. The field and the formatting. **Entering the fields and other info for the report**

You can enter several different types of data into the Field column, as if the report was a Spread Sheet.

- **Fixed Values:** If you need a fixed value to appear on your report, simply enter that value in the fields column. The value must be enclosed in quotes. This can be used for entering a plan ID or record identifier in a 401(k) output file. Examples: "100" "ML71"
- **Database Values:** You can enter values from your database by selecting them from the list of available fields. The list will vary based on the Report Type that you selected. Simply double click on the desired value to add it to the report.

There are more complicated things that can be done to a report. Those will be discussed in further sections of this article and knowledge base.

Special Notes about Employee Listing Report Type

There are special sections under the list of Employee fields for the following information.

- **Deductions** - Employee deduction setup information.
- **Rates** - Employee's rate information.
- **CYTD** - Current year YTD values for all codes and code groups
- **CQTD** - Current quarter QTD values for all codes and code groups
- **CMTD** - current month MTD values for all codes and code groups.
- **Current** - current payroll values for all codes and code groups

The above mentioned special sections, use the year, month, quarter, and time frame of the report.

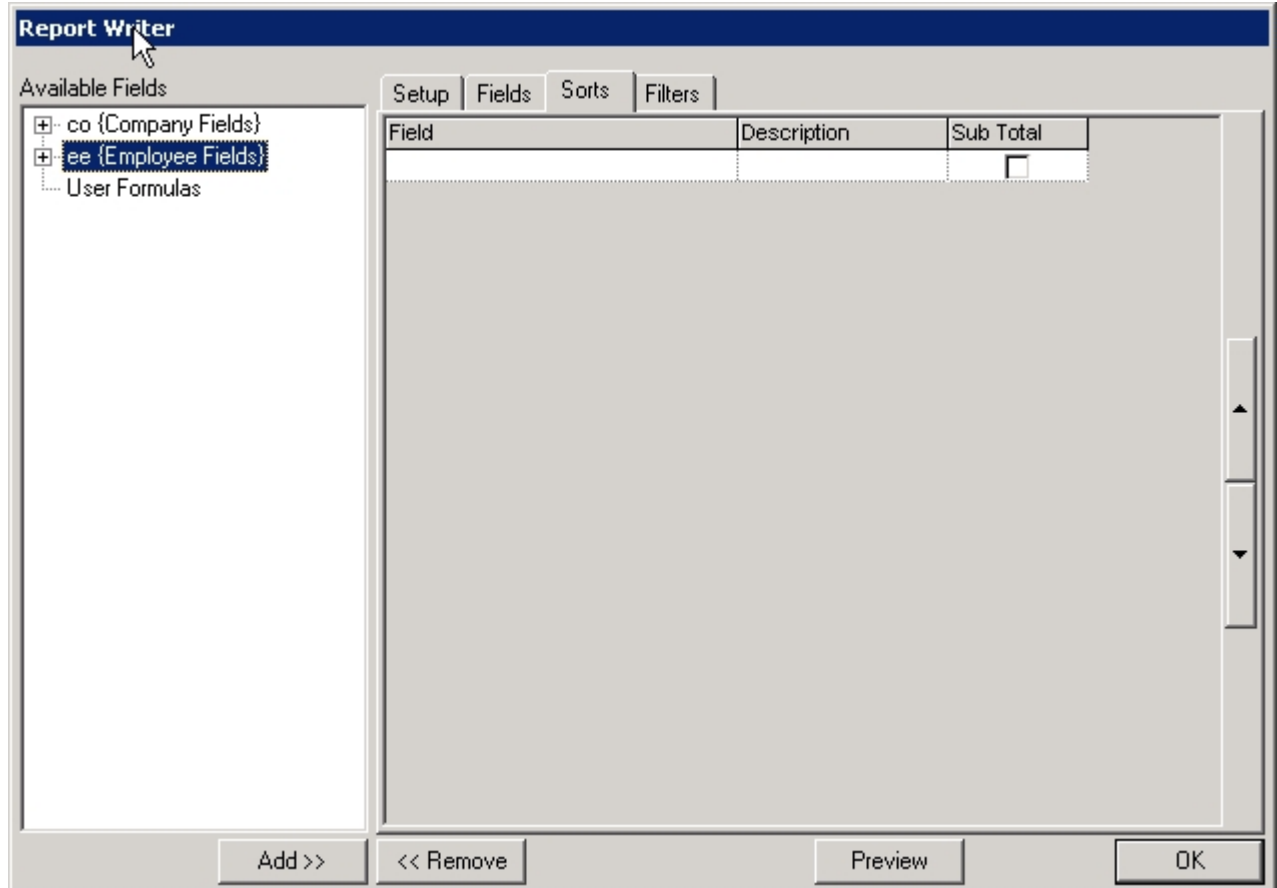
Formatting the Fields

Several formatting options are available to control the appearance and display of each field on the report for more info on the Formatting options and output options please refer to the advanced topics.

- **Heading:** This is the column heading that will appear above the field.
- **Len:** Maximum number of characters to display. If this field is set to 0, (zero) the field will not display.
- **Dec:** This is the number of decimal places to display
- **L/R:** Determines the field justification L = left justified R = right justified
- **Fill:** The value entered here will be the fill character. Most commonly used to zero fill fields on output files. For more fill options, see Alternative fill options.
- **Show 0:** If checked, zero values will display (0) zero.
- **Total:** Check this box to create totals for this field in the group footers.
- **No Punct:** (No Punctuation) Check this box to remove all punctuation from the value being displayed
- **No .:** (No Periods) Check this box to remove all decimals from number fields.
- **No ,:** (No Commas) Check this box to remove all commas from number fields.
- **Overpunch:** Check this box if you want numbers to be displayed using the overpunch format. The last digit of the number will be changed to a letter to differentiate between positive and negative numbers.
- **UPPERCASE:** Check this box to convert the data to all UPPERCASE characters.

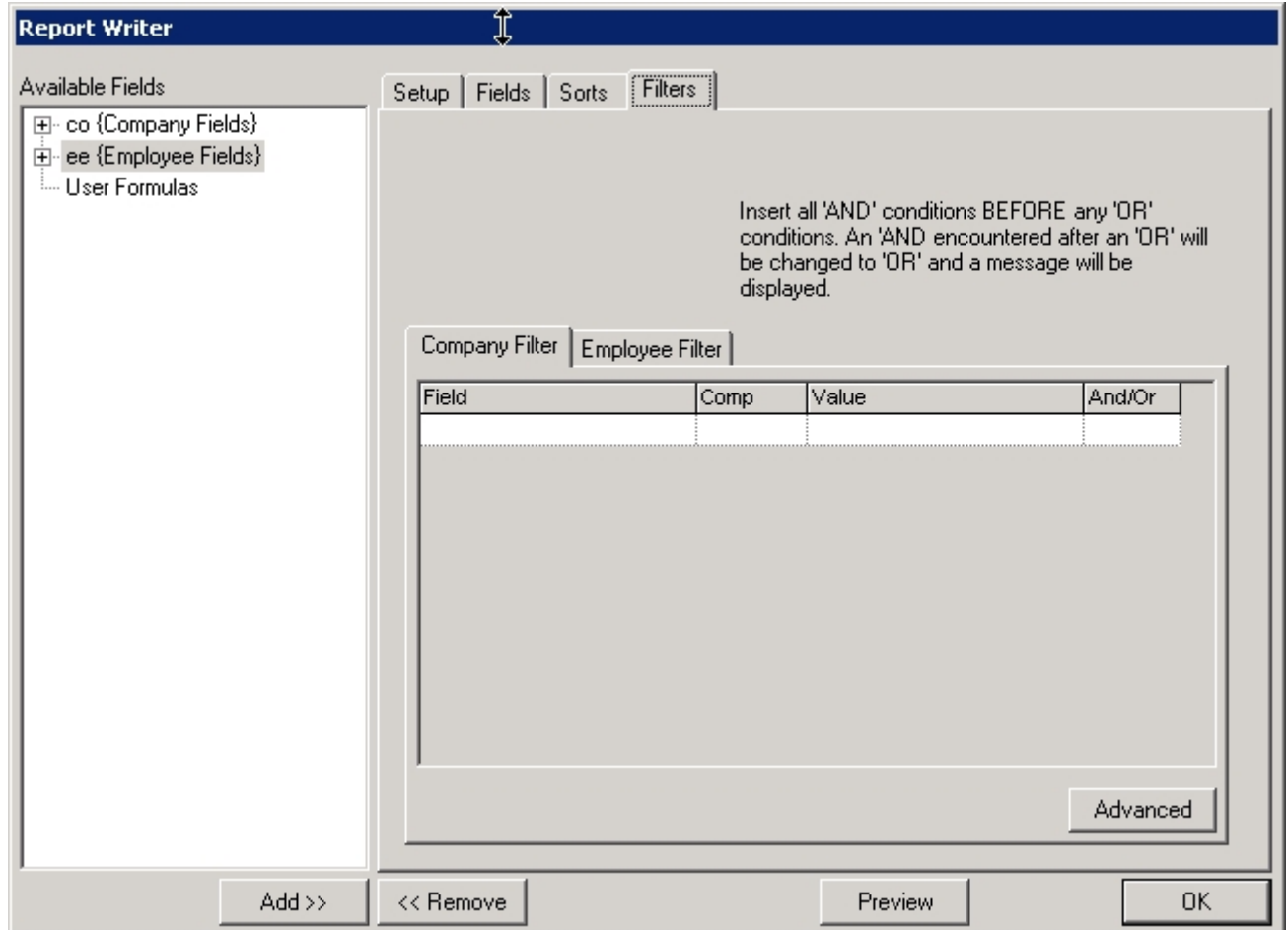
Now that we have created the content portion we can move onto the optional sorting and grouping as well as the filtering of the report data.

Step 5 : Sorting and Grouping Options in the Report



The Sort screen as you will see is similar to the Fields screen. Overview: Sorting options are provided to control the display order of the report. Additionally, totals may be generated at each sort break by checking the Sub Total field. These subtotals are in addition to any field level total defined in the Fields tab. Totals will be generated for each selected field that can be mathematically summarized. Double click on field(s) in the Available Fields list to add fields to the Sort table.

Step 6 : Filtering the Report



Filters allow you to control which data is included on or excluded from the report. Fields used as filtering elements do not need to appear on the report. Each report will have a Company and Employee filter option. Some reports will have a third filter which is determined by the report type selection.

Method 1

Please note that filter statements should be setup on the Employee Filter tab for filtering of data that is related to employee listings. Use the Company Filter tab to filter company based reports.

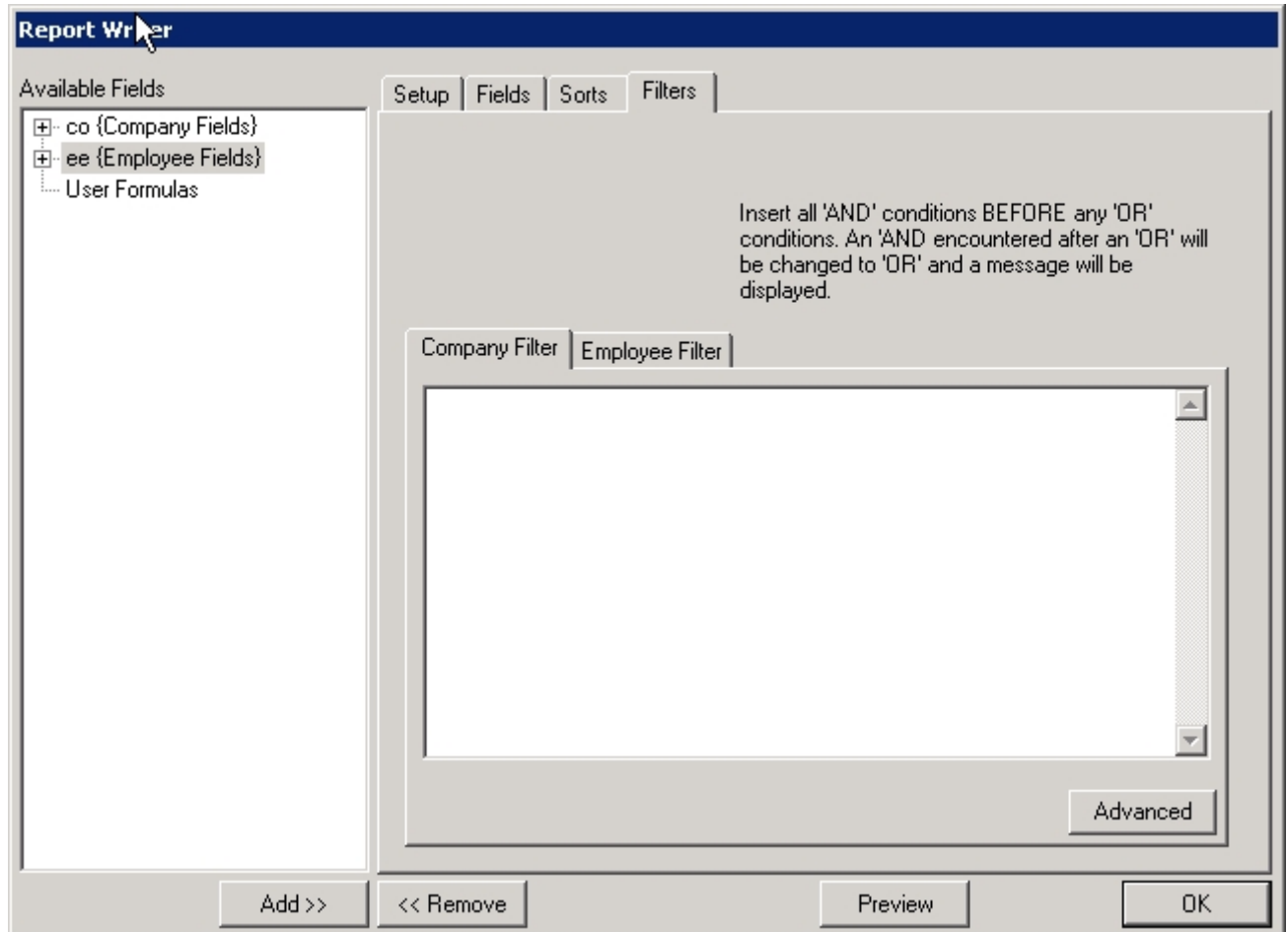
Filter definitions are composed of four (4) parts

- **Field:** This is a field from the database. Double click on the field in the Available Fields list
- **Comp:** Used to specify how the Field is compared to the Value. Several options are available to control the comparison.
- **Value:** This is the value that is being compared to the database field
- **And/OR:** Used if you have multiple filtering statements.
If you use AND, all of the filter conditions must be met for the data to

display.

If you use OR, any one of the filter conditions must be met for the data to display.

Method 2



Method 2 allows you to filter your content by a SQL statement. Syntax is important when using this method.

Now that you have created the content and setup, you can press Ok at any time to save your changes. To preview you can press preview and the report should run for the last process payroll if it is based on date ranges.

While you are creating your reports it is important to constantly test how the report looks after running to verify you get the right data.